ITCD

Skype for Business User Guide
Windows
October 2015

Contents

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Introduction

Microsoft Skype for Business facilitates real-time, online communication and collaboration through instant messaging (IM) and Presence, which is an indicator of a user's availability to communicate.

Use Skype for Business to collaborate with multiple contacts within the same IM, conduct multiple IMs at the same time, customize your Presence information, send and receive files via IM conversations, call a contact using your computer's audio, and share your desktop, program, or video with contacts.

The instructions that follow refer to Windows Skype for Business 2015.

Starting Skype for Business

Windows Skype for Business users have the option to have it automatically start upon login.

1. If Skype for Business initiates when you start your computer, close the program and establish your VPN connection.

> If you do not want Skype for Business to automatically start upon initial login to your computer, follow these steps:
>
> 1. With Skype for Business open, click **Tools** | **Options** | **Personal**.
> 2. Uncheck **Automatically start the app when I log on to Windows**

2. Launch Skype for Business from your toolbar:

Skype for Business Contacts

To locate a contact, use one of these methods:

- Click the Contact icon | Enter a name in the text box | Either press return, or click the magnifying glass icon .
- Alternatively, you can organize your contacts into groups (see below), allowing you to find someone with just a couple of clicks, rather than having to type in a name.

Create Groups

Create groups so that you can organize your contacts for easier viewing. It also allows you to quickly send individual or group messages. To create a group in Windows:

1. Click on the **Contact** icon | Right-click on one of the existing groups, such as Favorites | Select **Create New Group**, as shown at right.

2. When the new entry appears, give the group a meaningful name by typing in the blue text box, as shown below.

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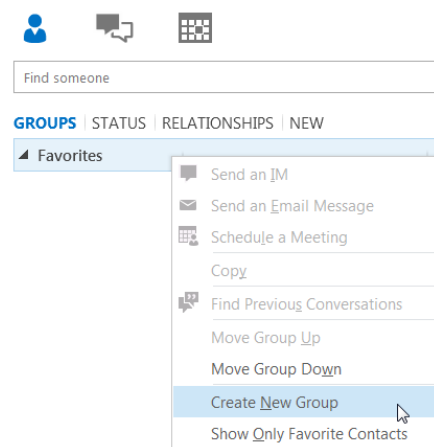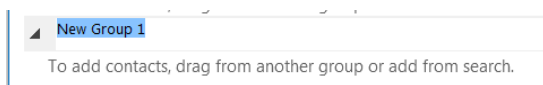
3. Right-click on the group you just created to move the group up or down in the list. For example, you may want to put the list you use the most at the top.

4. Repeat these steps until you have created all your groups.

   You are now ready to populate these groups with contacts. You can do this in various ways. See Add Contacts to Skype for Business Groups.
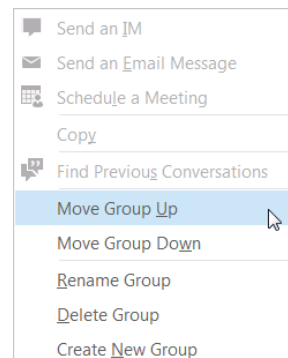
Add Contacts to Skype for Business Groups

After you have created your groups, as described above, use one of the following methods to add contacts to these groups.

Method One: Right-Click, Move

Search for a contact and right-click on the name in the search results | Select **Move Contact To** | Select the group where you want the contact to reside.

Method Two: Search and Add

1. Search for a contact.

2. Right-click on the name in the search results | Choose **Add to Contacts List** | Select the group where you want to the contact to reside.

   Alternatively, right-click | Choose **Add to Favorites**.
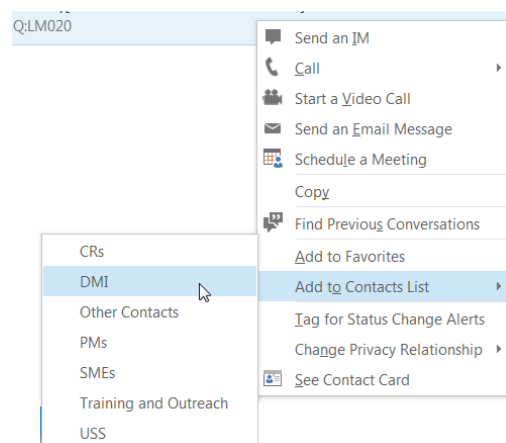
Method Three: Drag and Drop

Click on one of your existing contacts | Drag it to the group where you want it to reside.

In the example at the right, John Doe was added as a contact (**Add to Favorites**) and then dragged into one of the existing groups.
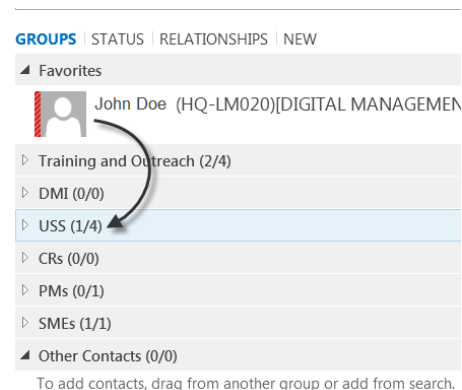
New Option

Click **New** to view the people who've added you as a contact. Their name appears here, allowing you to add them to your Contacts list to make sure they can contact you and see when you are available.

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Availability Status in Skype for Business

This section describes how to display your availability to others, and how to view the availability of others.

Indicate Your Status

Presence is a feature in Skype for Business that indicates your availability to communicate with others. Indicate your status using any of these methods:

- When you schedule a meeting in your Outlook calendar, or are on a Skype for Business call or video call, your status is automatically reflected in Skype for Business.
- Use the Presence Status menu (shown at right) to select one of the following: Available, Busy, Do Not Disturb, Be Right Back, Off Work, Appear Away, Signed out.
- You can add additional information to the Presence status. In the example below, the Presence status indicates that Jane Doe is in a meeting.

    1. Place your cursor after the existing Presence status | Type your message, such as, "Will be free at 10:00."

    2. Press Enter.
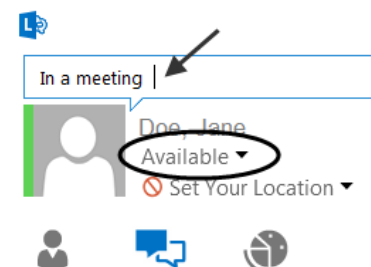
Check a Contact's Status

Before communicating with a contact, you can check their availability to see if they are online, away, or unavailable.

Click **Status** to quickly see who is online, away, or unavailable.

In addition to the color-coded contact picture, as shown at right, a contact may indicate their availability by adding a message:

Create Status Alerts

If a contact is unavailable, you can be alerted when they become available. To do this, right-click on the contact | Select **Tag for Status Change Alerts**.

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Control Information Access

With Skype for Business you can manage how much presence information others see. To do this:

1. Click **Relationships**

GROUPS | STATUS | **RELATIONSHIPS** | NEW

2. Right-click on the contact | Select **Change Privacy Relationship** and then one of the following as appropriate:

Friends and Family	Share note, location, and all contact information except meeting details.
Workgroup	Share note, meeting location, and all contact information except Home and Other phone; contact can interrupt Do Not Disturb status.
Colleagues	Share note, location, and all contact information except Home, Other, and Mobile phone, and meeting details.
External Contacts	Share only name, title, e-mail address, company, and picture.
Blocked Contacts	Share only name and e-mail address, blocked contacts can't reach you via Skype for Business.
Auto-assign Relationship	Reset this privacy relationship to the Skype for Business default.

Skype for Business Instant Messaging

Skype for Business instant messaging (IM) is an efficient way to connect with your contacts in real time and on a moment's notice. It is less formal than e-mail and faster than a phone call. To send an IM, follow these steps:

1. Check to see if your contact is available. If they are available, their picture shows a green vertical bar, as shown at right. They will also have a label after their name saying, Available.

2. Do one of the following:

   - Hover over their picture | From the quick Skype for Business bar, click the **IM** button, shown at right.
   - Double-click anywhere on their contact listing.
   - Right-click their listing and select **Send an Instant Message**.

3. Type your message at the bottom of the conversation window, changing font, adding emoticons, and setting priority as desired | Press **Enter**.

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Send IM to Several Contacts at Once

To send an IM to several people at the same time, do the following:

1. If the people you want to send the IM to:

Appear as adjacent contacts in your Contacts list…	Press and hold the Shift key while you click the listing for each person.
Are not listed adjacently…	Press and hold the Ctrl key while you click them.
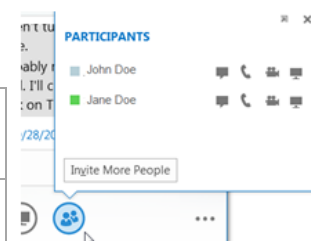
2. Click the IM icon that appears next to the last contact you selected.

3. Type your message at the bottom of the conversation window | Press **Enter**.

Add Participants

To add participants to your existing chat, click the **Invite More People** icon |
Select the person you wish to invite.
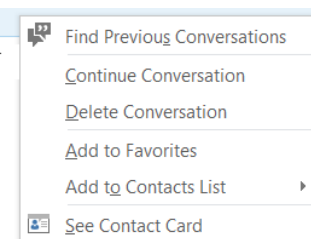
View Message History

Click the Conversations icon to see a history of past instant message conversations.

If you right-click on a conversation, you are given a menu to perform various actions such as , Find Previous Conversations, Continue Conversation, Delete Conversation, Add to Favorites, Add to Contacts List, and See Contact Card.

Transfer Files

You can transfer files from peer to peer or with more than one person in a meeting room. Just drag and drop the file you want to share in the outgoing chat box. Alternatively, you can use the Insert File button in the Attachments view.

Make a Skype for Business Call

A Skype for Business call is from your computer to someone else's computer who is also using Skype for Business (computer audio).

Skype for Business does not have the ability to make an outside call.

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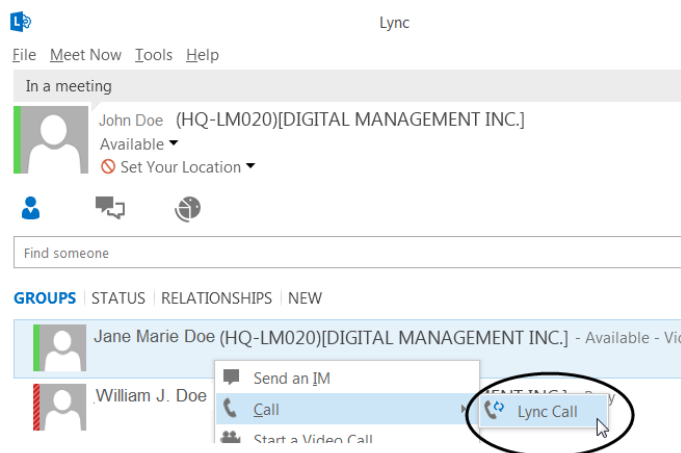
To initiate a Skype for Business call:

1. Click the Contacts icon ![contacts icon] and navigate to the contact you wish to call.

2. Do one of the following:

   - Click the Phone icon to call the contact with Skype for Business.
   - Launch the menu next to the Phone icon and select **Skype Call**.

Meetings

When you create a meeting using Skype for Business, you can check if you have any scheduled meetings, search for people, view their schedules, invite people to a meeting you are just about to start, as well as schedule a meeting for the future just as you can in Outlook. A meeting that you create in Skype for Business appears on your calendar in Outlook. The meeting option functions differently in Windows and Macintosh. Skype for Business meetings are limited to 199 participants. To create an online meeting, you must have a VTS standard seat, which you can request through the Enterprise Service Desk (ESD).

Check for Scheduled Meetings

To see if you have any meetings scheduled, click on the **Meetings** icon ![meetings icon] and view the message:
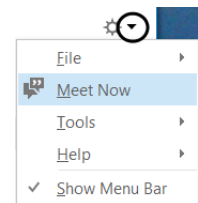
Send Invitation for Skype for Business Meeting

The following sections detail the various methods to schedule Skype for Business meetings and send invitations to attendees.

Invite Others to Join Your Instant Message Meeting

To send Skype for Business invites for an IM meeting you are about to start:

1. Click the Options menu (circled at right) | Select **Meet Now**.

2. When the Conversation window appears, hover your cursor over the Invite **More People** icon (shown below) | Click **Invite More People**

3. Scroll through your contacts and select the correct one | Click **OK**.
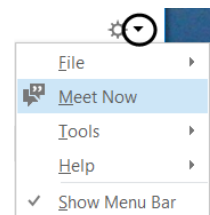
An invite is sent to that person and they are added to the conversation.

Send Outlook E-Mail Invites Using Skype for Business

To send Outlook e-mail invites for a meeting using Skype for Business:

1. Click the **Options** menu (circled at right) | Select **Meet Now**.

2. When the **Conversation** window appears, click the **Invite More People** icon ⊛ to activate it ⊛ | Hover your cursor over it and click **Invite by Email.**

3. When the new Outlook e-mail appears, invite appropriate attendees. For outside attendees, enter their e-mail address.

> To invite more than 15 internal people, or an outside person, you must have a VTS standard seat, which you can request through the Enterprise Service Desk (ESD).

4. Enter the **Subject** text | **Starts** date and time | **Ends** date and time | Click **Send**.

Send Outlook E-Mail Invites Using Outlook Calendar

To send Outlook e-mail invites for a Skype for Business meeting using Outlook Calendar:
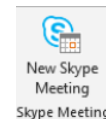
1. From your Calendar in Outlook, on the **Home** tab, click **New Skype Meeting** (shown right)

> If you don't see the **New Skype Meeting** icon and link, click **File** | **Options** | **Add-Ins**. At the bottom, from the **Manage:** menu, select **COM Add-ins** | Click **Go…** Check the box next to **Skype Meeting Add-in for Microsoft Office 2013** | Click **OK**. If you still do not see the **New Skype Meeting** icon, call the Enterprise Service Desk (ESD).

A Skype 2015 Web Conferencing Meeting window displays containing a link for the participants to join your Skype for Business Meeting. The location defaults to Skype Meeting.
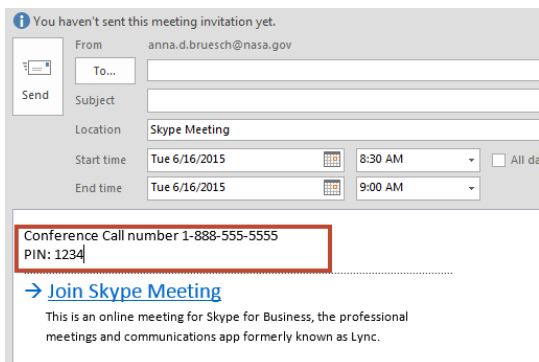
2. Invite appropriate attendees. For outside attendees, enter their e-mail address.

> To invite an outside person, you must have a VTS standard seat, which you can request through the Enterprise Service Desk (ESD)

3. Enter the **Subject** text | **Starts** date and time | **Ends** date and time.

4. Indicate any Skype for Business Web Conferencing Options as necessary | Click **Send**.

Skype for Business Web Conferencing Options

For Skype for Business Web Conference options:

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1. Click **Meeting Options** ![Meeting Options icon] at the top in the **Skype Meeting** group.

2. Under the **Where do you want to meet online?** Section, the first option is selected by default:

   Select **A new meeting space (I control permissions)** to use a unique meeting space each time with unique information, to limit participants to only those invited, and to control what access the participants have.

   Do not change this setting.

   Where do you want to meet online?   Help me decide
   ○ A new meeting space (I control permissions)
      Each meeting I create is held in a new space with unique entry info. I choose who
      gets in and what they can do in the meeting.
   ○ My dedicated meeting space (less secure)
      All meetings I create are held in the same space with the same entry info. People from
      my company can get into the meeting at any time as presenters.

3. From the **These people don't have to wait in the lobby:** menu, indicate who gets into the meeting directly, and who waits until you let them in.

Who gets in directly?	What happens?	Recommended when…
Only me, the meeting organizer	You are the only one who gets into the meeting directly. Everyone else has to wait until admitted.	You have a high security meeting and confidential information.
People I invite from my company	Only people invited can join the meeting directly. Everyone else has to wait until admitted.	You are discussing confidential information, and want only specific people to join.
Anyone from my organization	Anyone from NASA can get in to the meeting directly, even if not invited.	You do not have external participants and you are not discussing confidential information.
Anyone (no restrictions)	Anyone who has access to the meeting link gets in to the meeting directly.	You are inviting outside participants and you are not discussing confidential information.

It is best practice to always check these settings to ensure the meeting has the appropriate security. If you have a question about the appropriate security for your meeting, contact the Center Information Security Officer (CISO). For more information, visit http://itcd.hq.nasa.gov/itsecurity/it-security.html.

4. From the **Who's a presenter?** menu, indicate who can present in your meeting. All presenters have full control over the meeting and can share content, change the meeting options, mute people, and so on.

Who's a presenter?	What happens?	Recommended when…
Only me, the meeting organizer	Only you as the meeting organizer have presenter permissions.	Use when the participants do not have to interact with the meeting content. You can designate additional presenters during the meeting

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Anyone from my organization	Anyone from your company can be a presenter.	Suitable for causal meetings with your teammates, where all participants can share and modify content.
Anyone (no restrictions)	Everyone you invite can be a presenter.	Use when you have external participants and want them to present.
People I choose	You and the people you choose can be a presenter.	Use when you want specific people to be presenters.

IMPORTANT: When you select People I choose, click **Choose Presenters**, and then move the participants from the Attendee side to the Presenters side. External invitees and distribution lists cannot be added as presenters, but you can grant presenter permission to individuals when you are in the meeting.

5. The **Do you want to limit participation** section is for when you are setting up a large event and want to eliminate interruption:

- Disable IM
- Mute all attendees
- Block attendees' video (Video in Skype for Business Web Conferencing is not supported at NASA).

6. Set the remaining options as appropriate and click **Send** .

Icon	Description
	Use the Reminder menu to set a reminder for this meeting.
	Make this meeting recurring.
	Show time zone options
	Request that attendees indicate whether they plan to attend or not.
	Check Names icon: Verify names and address you typed to make sure you can send messages to them.
	Categorize icon: Assign to a category: Family, friends, holiday, junk, Manager, Networking, Personal, Red Category, and Team Travel. You can also add a new category, or edit an existing category.
	Private icon: Hide the contents of this meeting from others.

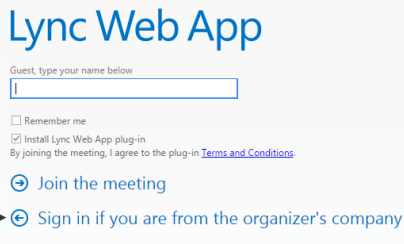## Skype for Business Meeting Invite

When you receive a Skype meeting invite, click **Accept**. It now appears on your Outlook calendar.

At the time of your Skype for Business meeting, you can access the meeting invitation using one of these

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methods:

- From the Outlook Calendar meeting, in the **Notes** section, click the **Join Skype Meeting** link.

  → Join Skype Meeting

- In Skype for Business, click on the calendar icon [icon] | Double-click the appointment.

Join a Skype for Business Meeting

When joining a meeting, it is recommended you use a NASA computer with skype installed. This ensures you have full access rights. If you choose to join a meeting using a non-NASA computer without Lync you must join the meeting as a guest..

> The meeting login steps vary depending on how the host set the options, and your participation in the meeting. You may be admitted directly to the meeting, or you may be prompted to log in to the meeting via the Web app.

Follow the steps for your situation:

> The use of Microsoft Lync or Skype for Business from a non-government-approved computer is authorized only when you log in as a guest.

[NASA Employee Using Government-Issued/Approved Windows Computer](#)
[Guest (Non-NASA People) Using Non-Government-Issued/Approved Computer](#)

→ Join Skype Meeting

NASA Employee Using Government-Issued/Approved Windows Computer

This is the recommended method for joining a meeting if you are a NASA employee with your NASA-Issued Windows computer.

1. In the Calendar section of Outlook, open the e-mail meeting invitation.

   > → Join Skype Meeting
   > This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.

2. Click the **Join Skype Meeting** link in the meeting window.

3. When the Privacy Disclaimer for NASA Skype for Business displays, click the checkbox next to **I have read the above and agree to the terms** | Click **Continue**.

To	Action
Display the Lobby and participants list	Click the **People** icon [icon] .
Admit attendees	Use the Lobby.
Share your desktop	Click the **Present** icon [icon]

Guest (Non-NASA People) Using Non-Government-Issued/Approved Computer

Only non-NASA people should be using this option. If you log in as a guest, you are considered external to NASA and do not have the rights and privileges available to you if you were logged in using NASA credentials.

> If you are the host of the meeting and you log in as a guest, you will not be able to present in the meeting room. Best practice is to log in from your government-issued or government-approved equipment.
>
> If you log in as a guest and the host does not have elevated rights with a VTS seat, you will not be able to join the meeting as the host does not have the rights for non-NASA email addresses to join his/her meeting. Best Practice: log in from your government-issued or government-approved equipment.

To log in as a guest:

1. In your e-mail application, open the meeting invitation and click the **Join Lync Meeting** link.

2. The first time you use Lync Web App, you are prompted to load a plug-in. Complete the download of the LWA Plugin64BitInstaller64 plugin.

   Subsequent logins do not require you to download the plug-in. Just click **Allow**.

3. Enter your name in the **Guest** field and click **Join the meeting**.

4. When the Privacy Disclaimer displays, click the box next to **I have read the above and agree to the terms** | Click **Continue**.
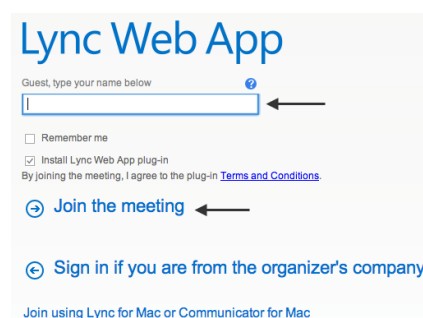
Presenting in a Skype for Business Meeting Room

Use Skype for Business to share your desktop or a program with contacts. Skype meetings are limited to 15 internal people without a VTS seat, or up to 199 internal or external participants with a VTS seat via a secure https Internet connection. To request a VTS standard seat, contact the [Enterprise Service Desk (ESD)](). If you have more than 199 participants, Skype for Business can support up to 1000 participants if you have elevated rights, which can be given on a meeting by meeting basis. To request elevated privileges for your meeting, submit a Service Request.

Share Desktop

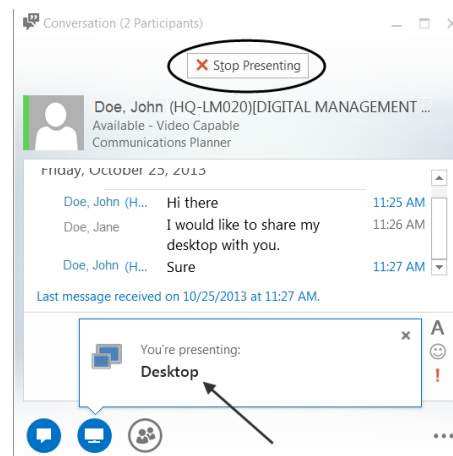To share your desktop while in a conversation, follow these steps:

1. Click the Monitor icon located at the bottom of the **Conversation** window.

2. When the **Present** window appears, click the **Desktop** icon. If you have more than one monitor, you will have the choice of selecting **Primary Monitor**, **Secondary Monitor**, or **All Monitors**.
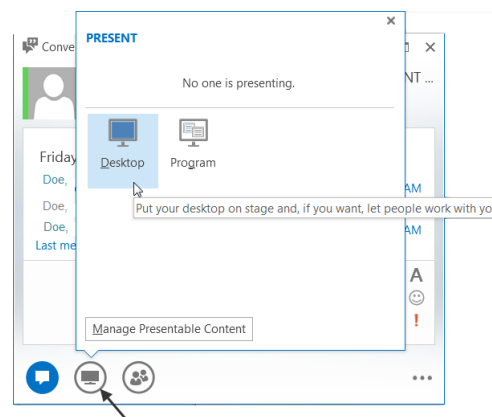
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3. When a message appears informing you that people will be able to see everything on your screen, click **OK**.

4. The other attendees can now see your desktop.

5. To stop sharing your desktop, click **Stop Presenting**, as shown at right.

   This returns you to your conversation.

Share Application

You can share an application only if the application sharing session is initiated from a Windows computer. You must also have the application open before you start. To share an application while in a conversation, follow these steps:

1. Open the application you would like to share. E.g., PowerPoint.

2. Click the Monitor icon located at the bottom of the **Conversation** window.

3. When the **Present** window appears, click the **Program** icon.
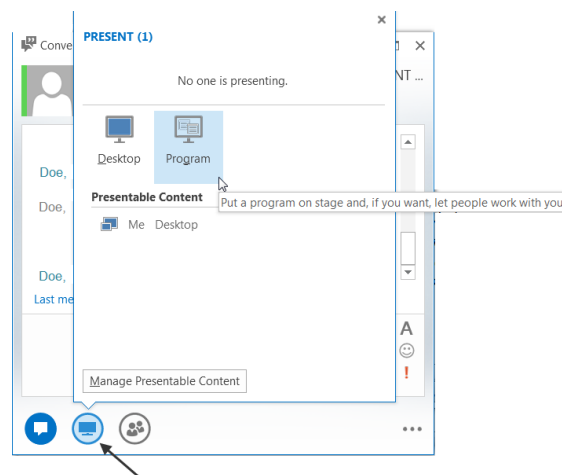
4. When the **Present Programs** window appears, as shown at right, select the program that you would like to share | Click **Present**.

5. When a message appears informing you that people will be able to see all the open windows of the program you chose, click **OK**.

6. To stop sharing your application, click the **Stop Presenting** button at the top of the conversation window. This returns you to your Conversation.
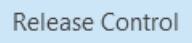
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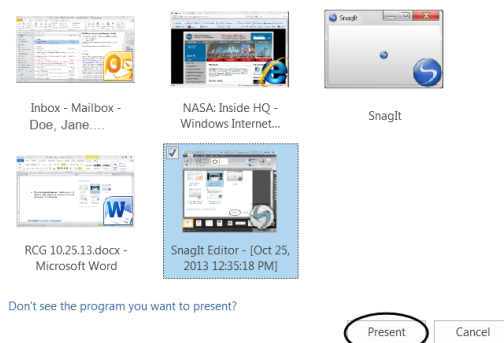
Give and Take Control When Sharing

Use the presentation toolbar at the top to share control of your desktop or application with another meeting participant. When you give control to another person, they can move the mouse in the presentation window, click on windows they have access to, and type in applications or documents that you are sharing with them.
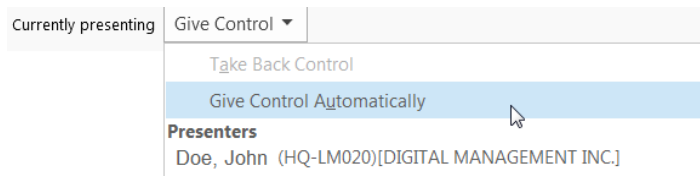
To:	Steps
Give Control	From the Presentation tool bar, click the Give Control menu | Select **Give Control Automatically**.
Take Back Control	From the Presentation tool bar, click the Give Control menu | Select Take Back Control. Alternatively, press Ctrl+Alt+Space.
Request Control	Click **Request Control**:
Release Control	Click **Release Control**

For information regarding obtaining a Skype Web conferencing account, contact the NASA Enterprise Service Desk (ESD) at (202) 358-HELP (4357) | Toll free: 1-866-4NASAHQ (462-7247).

Skype Video

The Skype for Business video functionality is available for Skype calls and messaging. To use video during a conference, you must have an account.
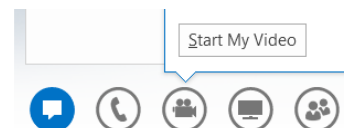
Skype Video

1. There are a number of ways to initiate a Skype for Business video chat in Windows:

   - Right-click on a contact name and select **Start a Video Call**.
   - Click once on or hover over a contact picture | Click the Start a video call icon:
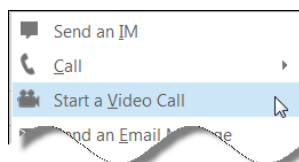
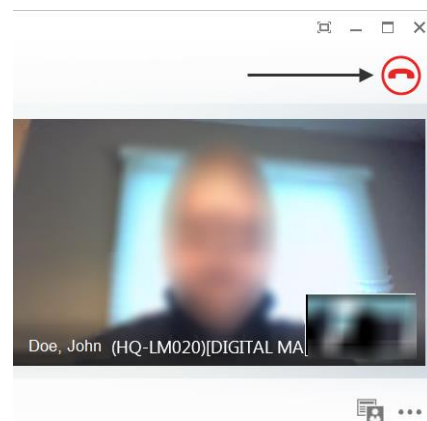   - Double click on a contact name | Click the Start My Video icon:

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2. To end your video chat, click the red phone icon .

For additional Skype for Business documentation, visit:
http://nomadinternal.nasa.gov/nomad/files/SkypeforBusinessUserGuide.pdf

For assistance, contact the Enterprise Service Desk (ESD): Submit a ticket online at esd.nasa.gov, or call 358-HELP (4357) or 1-866-4NASAHQ (462-7247).

This document is posted on the ITCD Web site at:
http://itcd.hq.nasa.gov/instructions.html

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